**RECONCILATION MODULE**

October 6, 1999
Last Updated 12/15/2000

# SWSS Project

USER REQUIREMENTS

# Table of Contents

# 1 INTRODUCTION

## 1.1 Purpose

The process of reconciliation needs to be automated to reduce input of data by the foster care worker. The process of Reconciliation involves the pre-filling of data from the Prior CPS Case into the converted foster care case. This data could be as old as the statewide implementation of the CPS Mapper and could be as new as the day before conversion, depending on how long the case has been active in foster care. For this reason the worker will need to do a separate action as part of the Utilities Module to view some of the data associated with the case and then accept the Prior CPS Case information or choose to reject it if it appears out dated or inaccurate. If rejected the worker will need to add all required data to the SWSS record.

## 1.2 Target Audience

This document is intended for SWSS development staff, who will be developing a Detailed Design document to address the requirements listed in this document. It will also be of interest to development staff charged with maintaining the SWSS automated system.

The following personnel may also be interested:
- SWSS Trainers
- FIA Help Desk Personnel
- SWSS Advance Users
- SWSS Project Staff tasked with developing the User's guide
- Zone Children's Services Specialist
- Foster Care, Adoption and Juvenile Justice Policy Offices
- ASSIST operators / CIS clerks

## 2  MODULE NARRATIVE

The process of reconciliation will involve only the foster care workers.  Juvenile Justice and Adoption cases will not have prior CPS case information to reconcile.  There are no forms associated with the reconciliation process.

In order to complete reconciliation, which can be considered the third stage of conversion, after the CIS and CSMIS data, the foster care worker will need to take a separate action, prior to case registration.  The process for this will be for the worker to choose a case which is unregistered, go to the Utilities icon and select the CPS Transfer Information button.  A message in SWSS will tell the worker at that time if there is not transfer information to be reconciled.  If there is Prior CPS Case Information a case summary screen would appear.  This will allow the worker to view a case summary of specific Protective Services 5 Day Packet information.   At this point the worker can choose to accept or reject the information, or close the case summary if the wrong case has been identified.  When the worker chooses to accept the data it will populate the appropriate screens.  This would essentially include data from the CPS 5 Day Packet and CPS case member information, which is not included in CIS or CSMIS.  Reconciled data will not overwrite CIS or CSMIS converted data, as CIS will be the most current.

Giving the foster care worker the option of accepting the available data is considered better than automatically filling in the Prior CPS Case Information during conversion. The reason for this include that the case may have been in transfer for over three years prior to FC SWSS implementation and the information known now is more accurate. The unique identifier between the PS and the FC case is the Recipient ID, which was not required when CPS Mapper was originally implemented.  Cases entered into CPS Mapper without a Recipient ID will not have data that can be reconciled, as CPS did not require the entry of a client ID number when the system was implemented.  Other cases will not have CPS transfer information as many counties did not use the CPS transfer module.

## 3   NAVIGATION FLOW

### 3.1   Screen Interaction

The screens needed for the reconciliation process must include a way to view the information available from the CPS case. There must be a case summary screen followed by a screen showing the list of case members.  From there a more detailed screen can be accessed for each case member which shows details such as address, phone number, relationship, date of birth and more.  From the case member listing the option to view the narrative information from the 5 Day Packet is also available.

### 3.2   System Flow

How does the data entered in this module effect the system flow within this module (or beyond the scope of this module, if appropriate).

There is no data entered as such in the reconciliation module.  Rather the data, if accepted, pre-fills into specific modules within the SWSS flow.  Modules included are Child Information, Member Information, Legal, and 5 Day Packet Module.  The quality of the data which pre-fills will depend on the extent to which the Protective Services worker completed the 5 Day Packet required for the transfer of the case from PS to Foster Care.

***"Need to include information on the relationship and order of handling companionation and reconciliation of converted case." (from 10/1/99 MAJ Reconciliation memo—need clarification).***

## 4   REQUIREMENTS LIST

The comprehensive (we hope) list of requirements derived from the original requirements, ensuing memos, emails, and test plan documentation.

### 4.1   Screen, Data, Out-of-Module, Output, Out-of-Module and Miscellaneous Requirements

The following requirements were derived from the original requirements documents written by policy staff for the SWSS project.  Any ensuing memos, emails, or test plans regarding the project were also searched.  It is intended to be a comprehensive list of all requirements pertaining to the Reconciliation module.  Each individual requirement has a unique identifier; the three-letter prefix identifies this particular module.

The list is to be used in a Requirements Traceability Matrix, which will be comprised of all the requirements for all the SWSS modules, so that the status of each requirement can be tracked and verified.

**JTL-1**          **SCREEN REQUIREMENTS:**

JTL-1.1          The Reconciliation module must have a screen displaying the child from a conversion case so that the worker can accept or reject the cases.

JTL-1.1.1        The accept/reject screen must show the following data elements about the children and members of a PS case:

JTL-1.1.1.1          Child' Name

JTL-1.1.1.2          Case number

JTL-1.1.1.3          Load number of primary worker

JTL-1.1.1.4          Program Code

JTL-1.1.1.5          Log ID

JTL-1.1.1.6          Case status

JTL-1.1.1.7          Member's Name

JTL-1.1.1.8          Member's DOB

JTL-1.1.1.9          Member's Client ID

JTL-1.1.2        There must be a way for the worker to ACCEPT the child's case information.

JTL-1.1.3        There must be a way for the worker to REJECT the child's case information.

JTL-1.1.4        There must be a way for the worker to CANCEL the process.

JTL-1.2          There must be a summary of the child; i.e., a Child Summary screen.

| | | |
|---|---|---|
| JTL-1.2.1 | The Foster Care Summary screen must display the following data elements about the child: | |
| JTL-1.2.1.1 | Name | |
| JTL-1.2.1.2 | CIS FC Case number | |
| JTL-1.2.1.3 | SWSS FC Log number | |
| JTL-1.2.1.4 | Open date | |
| JTL-1.2.1.5 | Client ID# | |
| JTL-1.2.1.6 | SSN | |
| JTL-1.2.1.7 | DOB | |
| JTL-1.2.1.8 | Sex | |
| JTL-1.2.1.9 | Race | |
| JTL-1.2.1.10 | Legal Status | |
| JTL-1.2.1.11 | Living Arrangement | |
| JTL-1.2.1.12 | Provider Name | |
| JTL-1.2.1.13 | Date Placed with provider | |
| JTL-1.2.1.14 | Provider Name | |
| JTL-1.2.1.15 | Provider Address | |
| JTL-1.2.1.16 | Handicap Type | |
| JTL-1.2.1.17 | Close Date | |
| JTL-1.2.1.18 | Assigned Primary Worker | |
| JTL-1.2.1.19 | Case Status | |
| JTL-1.3 | There must be a summary of each member in the CPS case; i.e., a Member Summary screen | |
| JTL-1.3.1 | The Member Summary screen must display the following data elements from the CPS case about each member: | |
| JTL-1.3.1.1 | Name | |
| JTL-1.3.1.2 | PS Case # | |
| JTL-1.3.1.3 | PS Log # | |
| JTL-1.3.1.4 | Client ID | |

JTL-1.3.1.5          SSN

JTL-1.3.1.6          DOB

JTL-1.3.1.7          Sex

JTL-1.3.1.8          Race

JTL-1.3.1.9          Language

JTL-1.3.1.10         Member's Relationship to (currently selected) child.

JTL-1.3.1.11         Address

JTL-1.3.1.12         Phone #

JTL-1.4             The 5 Day Q & A screen must display the questions and answers
                    pertaining to the 5 Day packet.

**JTL-2             DATA EDITING REQUIREMENTS:**

JTL-2.1             The following data elements from Mapper-CPS are to be transferred into
                    SWSS FC:

JTL-2.1.1           Case Information from MAPPER "A" line type

JTL-2.1.1.1          A026-001: Recommended type of foster home placement

JTL-2.1.1.2          A056-001: Recommended type of FC, # of parents

JTL-2.1.1.3          A058-001: Recommended type of FC, coed (y/n)

JTL-2.1.1.4          Case Information from MAPPER "TAB" line type

JTL-2.1.1.5          TAB005-007: State Log Number

JTL-2.1.1.6          TAB018-015: State Case Number

JTL-2.1.2           Person Information from "B" line types (children and case members will
                    each have a B line and a D line)

JTL-2.1.2.1          B004-001: Transfer Status (I=individual, c=companion, d=delete,
                    o=other)

JTL-2.1.2.2          B010-018: Last Name

JTL-2.1.2.3          B029-015: First Name

JTL-2.1.2.4          B045-001: Middle Initial

JTL-2.1.2.5          B047-008: DOB (YYYYMMDD)

JTL-2.1.2.6          B056-008: RID# (Client ID)

| JTL-2.1.2.7 | B066-001: SEX |
|---|---|
| JTL-2.1.2.8 | B068-009: SSN |
| JTL-2.1.2.9 | B078-001: Race (must be converted) |
| JTL-2.1.2.10 | B080:001: Language |
| JTL-2.1.2.11 | B086-001: Marital Status |
| JTL-2.1.2.12 | B094-001: Emergency Contact |
| JTL-2.1.2.13 | B107-010: Occupation |
| JTL-2.1.2.14 | B118-002: Education |
| JTL-2.1.2.15 | B123-002: Religion (Must be converted) |

JTL-2.1.3        Address information from "D" line types (each child and member will have a D line that corresponds to one B line.)

| JTL-2.1.3.1 | D010-020: Address Line 1 |
|---|---|
| JTL-2.1.3.2 | D031-020: Address Line 2 |
| JTL-2.1.3.3 | D052-015: City |
| JTL-2.1.3.4 | D068-002: State Code |
| JTL-2.1.3.5 | D071-010: Zip Code |
| JTL-2.1.3.6 | D082-010: Phone #1 |
| JTL-2.1.3.7 | D093-010: Phone #2 |

JTL-2.1.4        Five Day packet comment information from "I" line types.  (Multiple I lines will be sequenced together and must be combined into a single five day packet answer!)

JTL-2.1.4.1        I010-001: Comment Type "R" or "O" (Required or Optional Five Day Packet comment types)

JTL-2.1.4.2        I013-078: Comment text

JTL-2.1.5        Placement information from "N" line type

JTL-2.1.5.1        AFCARS removal reasons (at least one of the following, unless the child was placed in his or her own home)

| JTL-2.1.5.1.1 | O074-001: NEGLECT |
|---|---|
| JTL-2.1.5.1.2 | O075-001: ABANDONMENT |
| JTL-2.1.5.1.3 | O076-001: PHYSICAL ABUSE |

JTL-2.1.5.1.4        O077-001: SEXUAL ABUSE

JTL-2.1.5.1.5        O078-001: RELINQUISHMENT

JTL-2.1.5.1.6        O079-001: DEATH OF PARENTS

JTL-2.1.5.1.7        O080-001: CHILD'S DISABILITY

JTL-2.1.5.1.8        O081-001: INADEQUATE HOUSING

JTL-2.1.5.1.9        O082-001: DRUG ABUSE OF CHILD

JTL-2.1.5.1.10       O083-001: ALCOHOL ABUSE OF CHILD

JTL-2.1.5.1.11       O084-001: DRUG ABUSE OF PARENT

JTL-2.1.5.1.12       O085-001: ALCOHOL ABUSE OF PARENT

JTL-2.1.5.1.13       O086-001: CHILD'S BEHAVIOR PROBLEM

JTL-2.1.5.1.14       O087-001: INCARCERATION OF PARENTS

JTL-2.1.5.1.15       O088-001: CARETAKER'S INABILITY TO COPE DUE TO ILLNESS OR
                     OTHER REASON

JTL-2.1.6        Relationship information from "R" line types

JTL-2.1.6.1         R005-002: Person # (a MAPPER-PS identification number) of 1st
                 person in the relationship matrix

JTL-2.1.6.2         R012-002: Relationship of 1st person to person # in 5-2

JTL-2.1.6.3         R014-002: Person # of 2nd person in the relationship matrix

JTL-2.1.6.4         R016-002: Relationship of 2nd person to person # in 5-2.

JTL-2.1.6.5         R018-002: Person # of 3rd person in the relationship matrix

JTL-2.1.6.6         R020-002: Relationship of 3rd person to person # in 5-2

JTL-2.1.6.7         R022-002: Person # of 4th person in the relationship matrix

JTL-2.1.6.8         R024-002: Relationship of 4th  person to person # in 5-2

JTL-2.1.6.9         R026-002: Person # of 5th person in the relationship matrix

JTL-2.1.6.10        R028-002: Relationship of 5th person to person # in 5-2

JTL-2.1.6.11        R030-002: Person # of 6th person in the relationship matrix

JTL-2.1.6.12        R032-002: Relationship of 6th person to person # in 5-2

JTL-2.1.6.13        R034-002: Person # of 7th person in the relationship matrix

JTL-2.1.6.14        R036-002: Relationship of 7th person to person # in 5-2

JTL-2.1.6.15        R038-002: Person # of 8th person in the relationship matrix

JTL-2.1.6.16        R040-002: Relationship of 8th person to person # in 5-2

JTL-2.1.6.17        R042-002: Person # of 9th person in the relationship matrix

JTL-2.1.6.18        R044-002: Relationship of 9th person to person # in 5-2

JTL-2.1.6.19        R046-002: Person # of 10th person in the relationship matrix

JTL-2.1.6.20        R048-002: Relationship of 10th person to person # in 5-2

JTL-2.1.6.21        R050-002: Person # of 11th person in the relationship matrix

JTL-2.1.6.22        R052-002: Relationship of 11th person to person # in 5-2

JTL-2.1.6.23        R054-002: Person # of 12th person in the relationship matrix

JTL-2.1.6.24        R056-002: Relationship of 12th person to person # in 5-2

JTL-2.1.6.25        R058-002: Person # of 13th person in the relationship matrix

JTL-2.1.6.26        R060-002: Relationship of 13th person to person # in 5-2

JTL-2.1.7       PS data does not overwrite current data from CIS.

**JTL-3         OUT-OF-MODULE REQUIREMENTS:**

**JTL-4         MODULE REQUIREMENTS:**

JTL-4.1         After the successful termination of the reconciliation process, whether it
                was an ACCEPT or a REJECT, the case's information is no longer
                accessible and the user is returned to the main menu.

JTL-4.2         There must be a way for the worker to CANCEL the process.

JTL-4.3         If the user performs an action upon the database after the database has
                timed the user out, SWSS must automatically reconnect to the database
                and continue working.

JTL-4.4         Central Office users (county 84) need inquiry access for case information.

**JTL-5         OUTPUT REQUIREMENTS:**

**JTL-6         MISCELLANEOUS REQUIREMENTS:**

## 5  EXAMPLE OUTPUT

Gather and include the forms and letters generated by this module.

There are no output documents from the reconciliation process.

# 6 DATA ELEMENT DESCRIPTIONS

A table of all the data elements entered within this module.

As there is no data entered within the reconciliation module, or process, there is no data element description.

The list of data elements which can be reconciled from the Prior CPS Case Information includes the following, including a list of modules which the data will populate:
Child Information
      religion
      language
      recommended type of foster home
      number of parents
      co-ed y/n
Member Information
      First and last names of case members
      Relationship to the foster care case
      Address and telephone number(s)
      Sex
      ***Marital status?  2/23/99 email indicates this may not be what is in mapper.***
      Race
      Religion
      Education
      Recipient ID
      Language
      Social security number
      Occupation
      Emergency contact y/n
Legal Information
      Removal Petition Type and Date
      Removal Hearing Date
      Removal Order type
      Docket number #2
      Removal conditions

# 7   HELP MESSAGES

There are to be three levels of help available: Screen, which describes how the process for the current module is supposed to work, Context-Sensitive, which describes a particular data field on the screen, and Status Panel, which offer hints about the field or command button with the current focus.

7.1   SCREEN (Section or Module level.  Offers an entry point to the big help file.)

7.2   CONTEXT-SENSITIVE ("F1", aka "detail")

7.3   STATUS PANEL MESSAGES (formerly known as "Field Level" and "Baby" before that.)

## 8   MODULE DEPENDENCIES

No data can be entered in any other module before Reconciliation takes place.  It is a one time, conversion, option to gain the information about the case from the CPS case transfer.  Once the Case Registration module is completed the Reconciliation process is no longer available.

Information pre-fills into other modules if the Prior CPS Case Information is accepted.

# 9   SCENARIOS

The requirements scenarios that call for data entered by this module.  This is just a
cross reference into the

## 10 TEST PLANS

The updated test plans written by the Program Office and/or the developer to verify the correctness of the finished application.

## 11 SOURCE MATERIAL

The following items are included for historical purposes only. The current requirements were derived from this source material, and are, in places, out of date, incorrect, or conflicting.

## 11.1 Original Requirement

Reconciliation is included as part of the Foster Care, Adoption and Delinquency Data Conversion requirements dated 8/97 and signed 9/9/97

### CHILDREN'S *SWSS*
## REQUIREMENTS FORM

| Assigned Policy Analyst: | Wilson |
|---|---|
| Date Received By BuIS: | |
| Requirement # (from BuIS): | |

| TOPIC:  Statewide Foster Care, Adoption, and Delinquency Data Conversion Revised 8/97 |
|---|

3. **The third stage of conversion is converting SWSS Transfer to Foster Care Data.** The worker will need to be able to access a list of all the cases in their county that have been transferred from PS to FC which have data stored. They would then select the appropriate case and view a case summary of specific 5 Day Packet information.  When they have identified the correct case the worker will have the option to include the data in the transfer case record.  To do this they will select "Transfer (or Convert)  Data" and the data will populate the appropriate screens (data elements and mapping information are attached).  This would essentially include data from the 5 Day Packet which is not included in CIS or CSMIS.  Transfer data will not overwrite CIS or CSMIS data as CIS will be the most current of the converted data.

Giving the foster care worker the option of transferring the data available is considered better than automatically filling in the transfer data during conversion.  The reason for this include that the case may have been in transfer for over two years prior to FC SWSS implementation and the information known now is more accurate.  It also eliminates the chances of transferring cases which mistakenly appear more than once on the transfer list.  Another factor in this decision was that there was no unique identifier on the PS case that linked it to the FC case as the log number and case number change when transferred.

The display of the transfer list should contain the following elements:

| CFC Case name | DOB | Recipient ID * |
|---|---|---|

* Recipient ID will not be available on some cases as it was only very recently made a required field in the PS to FC Transfer.

CONVERSION OF TRANSFER TO FOSTER                    CLARIFICATIONS
CARE INFORMATION

| SWSS FOSTER CARE SCREEN AND ELEMENT NAME | FROM SWSS PROTECTIVE SERVICES SCREEN | THIS IS INFORMATION THAT IS NOT ON CIS OR CSMIS |
|---|---|---|
| **FC MEMBER INFORMATION** | **CPS H01** | *ITALICIZED ITEMS HAVE BEEN ADDED DURING 8/97 REVISION* |
| Relationship | | |
| last name of member | | |
| first name of member | | |
| Placement narrative | | **CPS NARRATIVE SECTION** |
| | | |
| **CHILD DATA** | **CPS H02** | |
| Religion (child's) | | |
| Language (child's) | | |
| *Recommended type of foster home* | | |
| | | |
| *Number of parents* | | |
| *co-ed y/n* | | |
| | | |
| **PARENT INFO OR RELATIVES/ OTHER PERSONS** | **CPS HO2** | |
| sex | | WHERE IT GOES DEPENDS ON THE RELATIONSHIP CODE |
| date of birth | | |
| Marital status | | |
| Race | | |
| Religion | | |
| Education | | |
| rid # | | |
| Language | | |
| social security numbers | | |
| Emergency contact Y/N | | |
| Occupation | | |
| Address including city, state and zip code | | |
| | | |
| phone number # 1 | | |
| phone number #2 | | |
| | | |
| **LEGAL INFORMATION SCREEN** | | **COURT INFORMATION** |
| court of jurisdiction | **CPS H03** | |
| Petition date | | |
| prelim hearing date | | |
| next hearing date | | |
| order type | | |
| order date | | |
| **MEDICAL DATA SCREEN** | **MEDICAL DATA** | |
| Physician name | **CPS HO4** | |

Physician address including city, state and zip code

phone # 1
phone # 2
date of last physical
date of last dental
Medical authorization given at time of placement Y/N

**FUNDING** **MEDICAL DATA**
**DETERMINATION AND**
**MEDICAID SCREENS**

Medical carrier **CPS H04**
Contract #
group #
plan code
Insurance name

**SERVICES SCREEN** **TREATMENT PLAN**
Services delivered to the PS **DO5**
case

## 11.2 Memos and Emails

There are no known historical memos on reconciliation.  One two-page email is included in this document.

To:    Sue London, Director                        date: 10/1/1999
          SWSS Project

From:  Mary Ann Jensen, Consultant
          SWSS Policy
          Child and Family Services
          Administration

Subject:  Reconciliation Module Documentation


We have carefully reviewed the User Requirements document on the Reconciliation Module and have the following clarifications:

Changes to September 16, 1999 Document (printed September 27, 1999):

1. Page 1, Purpose, last line:  Change "the current" to ***all required….***
2. Page 2, 2$^{nd}$ paragraph, 4$^{th}$ and 5$^{th}$ line:  The name of the button in Utilities is ***CPS Transfer Information*** not 'transfer to foster care'.
3. Page 2, 2$^{nd}$ paragraph, 8$^{th}$ line:  Delete "~~The worker will have the option to include the data in the transfer case record.~~  There is no option.  The worker must take all the data or none of the data.
4. Page 2, 2$^{nd}$ paragraph, 2$^{nd}$ sentence from end:  Add "…. data from the CPS 5 Day Packet ***and CPS case member information*** …."
5. Page 2, end of last paragraph:  Add "…. ***As CPS did not require the entry of a client ID number when the system was implemented.  Other cases will not have CPS transfer information as many counties did not use the CPS transfer module.***"
6. Page 3, 3.1:  Change last sentence to read "…. narrative information from the ~~CPS case~~ ***5 Day Packet*** is also….."
7. Page 3, System Flow:  Need to include information on the relationship and order of handling companionation and reconciliation of converted cases.
8. Page 4, JTL-1.1.1.6:  Change FC worker to CPS worker.
9. Page 5, JTL-1.2.1.2:  Is this the CPS or the FC case number?
10. Page 5, JTL-1.2.1.3:  Is this the CPS or the FC SWSS log number?
11. Page 5, JTL-1.3:  Change PS case to ***CPS*** case.
12. Page 6, JTL-2.1:  Change Mapper-PS to Mapper -***CPS***.
13. Page 7, JTL-2.1.2.15:  Legal Status converts from CIS/CSMIS.  It should not prefill from Reconciliation.
14. Page 8, JTL-2.1.5 through JTL-2.1.5.3:  This information does not transfer.
15. Page 9, JTL-4.1:  Need a statement about canceling out of the process.  See Module Narrative, second paragraph and JTL-1.1.4.
16. Page 10, JTL-7 through JTL-12:  This has not been completed.

Reconciliation Module Documentation

October 1, 1999
Page -2-


17. Page 12:  Legal Information:  Change the following:

Petition date: should be Removal Petition Type and Date
Preliminary Hearing Date:  Should be Removal Hearing Date
Order Type:  Should be Removal Order Type.

Please let me know if you need additional information.

cc:  Carol Kraklan
     Phil Rock
     Sue Doby
     Nancy Presocki

**From:**       Robert Rivera
**To:**         DSS2.CFS1(WILSONP2)
**Date:**       2/23/99 3:26pm
**Subject:**    Prior CPS Case Information -Reply

It looks like all this data you're requesting can be accomodated.  including
the medicaid data provided it's been entered into the mapper database.
couple little things:
Marital Status looks like it's just if the mother was married at the time of
the child's birth
We have a couple docket numbers and in a document I have from Carol it
specifies docket #2  that's the one I'm gonna grab.
and I think we discussed the medical authorization given at time of placement
defaulting to 'Y' but I'm not sure where that's stored IF indeed it is stored
anywhere.  BUT i will contiue to dig.
We should have something worthy of a more complete test end of this week begin
of next week at the latest barring any other "emergencies" that have a
tendency to arise on a consistant basis around here.

Until tomorrow,
Bob

>>> Pat Wilson 02/23/99 11:33am >>>
I am happy to report it is looking pretty good.  But first lets see if we
agree on the list of what I am looking for.
Child info:
religion
language
recommended type of foster home
number of parents
co-ed y/n

Member info:
first and last names
relationships
sex
marital status
race
religion
education
rid #
language
social security number
emergency contact y/n
occupation
address and phone number

Legal Info:
petition date
preliminary hearing date
order type
removal conditions
docket #

medical info:

```
date of last physical
date of last dental
medical authorization given at time of placement

Medicaid
medical carrier
contract #
group #
plan code
insurance name

Okay, if we agree on this is the list of what is supposed to come over, here
is what was missing:
Child Info:  religion, language, recommended type of foster home, number of
parents, co-ed y/n
Member Info: Education, Religion, Marital Status, Emergency Contact
Legal: Removal Conditions, Order type (does give a Petition Type), Docket
Number
Medical:  dates of last physical, dental and medical authorization given at
time of placement
Medicaid:  wasn't there but I doubt that any PS worker will ever have that
information so we may just want to forget that!
I can't get into the CPS Mapper side of things to check if these were
answered, but I am sure some were since you can't transfer a case without
answering the questions.
```

11.2.1        Addendum 1

### STATE OF MICHIGAN
# FAMILY INDEPENDENCE AGENCY

**MEMORANDUM**

**To:**    Sue London, Director                    Date:   May 2, 2000
SWSS Project

**From:**   Mary Ann Jensen, Consultant
SWSS Policy
Child and Family Services Adminstration

**Subject:**   Reconciliation Module Documentation - Addendum 1

Based on discussions with development, project and program staff, it was determined that
the October 1, 1999 memo regarding this module requires revision:

1. JTL-1.1.1.6 must be deleted.
2. JTL-1.1.1.10 must be deleted.
3. JTL-1.1.2 must be revised to state "…….the child's ~~cases~~ **case information**."
4. JTL-1.1.3 must be revised to state "…….the child's ~~cases~~ **case information**."
5. JTL-1.2.1 must be revised to state "The ~~Child~~ **Foster Care** Summary screen must
   display the following data elements ~~from the PS~~ about the child:"
6. JTL-1.4 must be deleted. (Note: JTL-1.4.1 remains a requirement.)
7. Add new requirement JTL-????:  The accept/reject screen must contain a panel listing
   the members of the CPS case who are under the age of 18 years.  These members
   must be display/information only.  They are not to be included in the prior CPS
   transfer information which is accepted/rejected by the foster care worker.

Please let me know if you need additional information.


cc:  Carol Kraklan
     Sue Doby
     Phil Rock
     Nancy Presocki

11.2.2        Addendum 2

**S T A T E   O F   M I C H I G A N**
# FAMILY INDEPENDENCE AGENCY

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**MEMORANDUM**

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**To:**    Sue London, Director                 Date:    June 12, 2000
            SWSS Project


**From:**   Mary Ann Jensen, Consultant
            SWSS Policy
            Child and Family Services Administration


**Subject:**   Reconciliation Module Documentation - Addendum 2

It is necessary to amend the Reconciliation Module Documentation memos of October 1, 1999, and May 2, 2000.  After focussed testing and discussions with development staff, it was noted that the following clarification is needed:

1. A new requirement is needed:  JTL-4.x  Relationship type LP should convert to NR (non-relative) at the time of acceptance.

Please let me know if you need additional information.

cc:  Carol Kraklan
       Phil Rock
       Sue Doby
       Nancy Presocki

11.2.3    Addendum 3

# FAMILY INDEPENDENCE AGENCY

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**MEMORANDUM**

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**To:**  Sue London, Director
SWSS Project

**Date:**  June 22, 2000

**From:**  Mary Ann Jensen, Consultant
SWSS Policy
Child and Family Services Administration

**Subject:**  Reconciliation Module Documentation - Addendum 3

It is necessary to amend the Reconciliation Module Documentation memos of October 1, 1999, May 2, 2000 and June 12, 2000.  After focussed testing (SER #426) and discussions with development staff, it was noted that the following clarifications are needed:

2. JTL-1.1.1.1 must be modified to state "There must be a Case Information panel which displays the follwing pieces of inforamtion about the child's case:"
3. Add sub-requirement JTL-1.1.1.1.1 "Case Name (Abbreviated to a maximum of 16 characters, including a space between them ….See CM-4.5.2.1 for additional details on this abbreviation.)"
4. Add sub-requirement JTL-1.1.1.1.2 "Case number"
5. Add sub-requirement JTL-1.1.1.1.3 "Load number of the primary worker"
6. Add sub-requirement JTL-1.1.1.1.4 "Log number"
7. Add sub-requirement JTL-1.1.1.1.5 "Program code"
8. Add sub-requirement JTL-1.1.1.1.6 "Case state"
9. Requirements JTL-1.1.1.2 through JTL-1.1.1.5 can be deleted.

Please let me know if you need additional information.

cc:  Carol Kraklan
Phil Rock
Sue Doby
Nancy Presocki

## 11.3   TEST PLAN

### 11.3.1        Test Plan Created by Policy

The following was taken from the Test Plan by Carol Kraklan:

> This data will come over from CPS either at the time the case is assigned from CPS to FC or at the time of conversion when the case is Reconciled.

Reconciliation

> During conversion CPS transfer case can be Reconciled with the converted cases in Oracle.  The information above will transfer into the foster care case before information is added to the case. (**Edit**).  This functionality will be in the Utilities Menu.  A worker can reconcile his or her own cases.  A Supervisor and above can reconcile anyone's cases that they directly supervise.

> In the local office the Local Office Security Coordinator will enter Utilities and will run the reconciliation program to send the Mapper CPS cases in transfer to the centralized database.  This will take placed immediately after conversion and the cases in the Mapper database will be matched by RID against those converted cases in the centralized database.  (See Utilities section for more information.)

### 11.3.2        Before entering any information on the converted case, a worker must select a case or enter a log # before entering the Utilities menu (**Edit**).  The Reconciliation program will check the RID in the case selected against those in the CPS transfer file.  If there is a match the worker will be taken to a case summary screen.  At that point the worker can View Details of the case or view 5-day packet narrative.  The worker can then either accept the case or reject the information.  S/he can not select what information they want transferred into the case.

## 12 OUTSTANDING ISSUES

12.1 The following items require a decision or some direction from Policy staff:

   1

## Attachment A: List of SWSS Module Prefixes